

Message Text

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INFO AMEMBASSY BELGRADE
AMEMBASSY BERLIN
AMEMBASSY BUCHAREST
AMEMBASSY BUDAPEST
AMCONSUL LENINGRAD
AMEMBASSY MOSCOW
AMEMBASSY PRAGUE
AMEMBASSY SOFIA
USMISSION USNATO
AMEMBASSY PARIS
USMISSION GENEVA
AMCONSUL KRAKOW POUCH
AMCONSUL POZNAN POUCH

C O N F I D E N T I A L SECTION 1 OF 3 WARSAW 9296

USOECD PARIS

EO 11652GDS
TAGS: ETRD, EFIN, ENRG, EAID, PL, UR, COMECON
SUBJ: NEW SOVIET-POLISH GRADE AND ECONOMIC-COOPERATION
PROTOCOLS SIGNED: RECORD EXPANSION IN 1978

1. INTRODUCTION AND SUMMARY. ON THE EVE OF PRESIDENT
CARTER'S VISIT TO POLAND AND IN THE WAKE OF A
NUMBER OF POLISH APPROACHES TO THE UNITED STATES AND
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OTHER WESTERN COUNTRIES FOR CREDITS AND ECONOMIC
ASSISTANCE, THE RECENT CONCLUSION OF SEVERAL POLISH/
ECONOMIC AGREEMENTS WITH THE USSR HAS EMPHASZIED ONE AGAIN MOSCOW'S
CONTINUED DOMINANCE IN POLISH FOREIGN TRADE AND
ECONOMIC RELATIONS. BILATERAL TRADE TURNOVER IN 1978
IS TARGETED AT ABOUT NINE BILLION DOLLARS, WITH THE
USSR TAKING NEARLY ONE-THIRD OF ALL POLAND'S EXPORTS.

PARTICULAR STRESS IS PLACED ON GREATLY INCREASED SOVIET IMPORTS OF POLISH CAPITAL EQUIPMENT, WHICH WILL RISE BY 27 PERCENT OVER 1977 LEVELS. THE EMBASSY ESTIMATES THAT MUCH OF THIS TRADE INCREASE MAY BE DUE TO POLISH REPAYMENT FOR SOVIET AID EXTENDED IN RECENT YEARS AND THAT ADDITIONAL SOVIET AID, SUBSEQUENT TO THE ONE BILLION RUBLE CREDIT EXTENDED TO POLAND IN 1976, MAY ALSO BE A FACTOR. THERE ARE ALSO INDICATIONS OF ACCELERATED INDUSTRIAL AND TECHNICAL COOPERATION IN ACCORDANCE WITH CEMA INTEGRATION PLANS AND THROUGH SOME SPECIAL AGREEMENT SIGNED IN MOSCOW. DESPITE THIS OVERWHELMING SOVIET ECONOMIC PRESENCE, NEXT YEAR'S SOVIET DELIVERIES TO POLAND OF INDUSTRIAL RAW MATERIALS AND ENERGY, INCLUDING CRUDE OIL, IRON ORE, COTTON, AND NON-FERROUS METALS, WILL CONTINUE TO BE AT NEAR-SUBSISTENCE LEVELS, JUST ENOUGH TO KEEP THE POLISH ECONOMY OPERATING AND FREE FROM ECONOMIC BREAKDOWNS WHICH COULD LEAD TO POLITICAL UNREST. FOR ADDITIONAL QUANTITIES AND ALSO FOR GRAIN, THE POLES MUST TURN TO HARD-CURRENCY MARKETS. END INTRODUCTION AND SUMMARY.

2. A 1978 POLISH-SOVIET TRADE PROTOCOL SIGNED IN WARSAW DECEMBER 17, CALLS FOR A RECORD TRADE TURNOVER NEXT YEAR OF 6.7 BILLION RUBLES (ABOUT NINE BILLION DOLLARS), AN INCREASE OF 17 PERCENT OVER LEVELS ESTABLISHED FOR 1977 BILATERAL TRADE. THE AGREEMENT CONFIDENTIAL

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WAS CONCLUDED AFTER A TWO-DAY VISIT TO WARSAW BY SOVIET FOREIGN TRADE MINISTER NIKOLAI PATOLICHEV AND STRONGLY EMPHASIZES EXPANSION OF TRADE IN MACHINERY AND INDUSTRIAL EQUIPMENT IN ADDITION TO SPECIALIZED PRODUCTION COOPERATION BETWEEN POLISH AND SOVIET INDUSTRY. THE AGREEMENT'S MAIN FEATURES FOLLOW AS REPORTED IN THE WARSAW PRESS.

A) MACHINERY AND EQUIPMENT - POLISH EXPORTS IN THIS CATEGORY WILL BE 27 PERCENT HIGHER THAN IN 1977 AND SOVIET EXPORTS WILL INCREASE BY ABOUT 11 PERCENT. POLISH EXPORTS WILL CONCENTRATE ON EQUIPMENT FOR THE CHEMICAL, FOOD-PROCESSING, AND CONSTRUCTION INDUSTRIES AND RAIL AND MARINE TRANSPORT. SOVIET EXPORTS WILL BE MAINLY FOR THE METALLURGICAL AND ELECTRIC-POWER INDUSTRIES, RAIL TRANSPORT, AND HOUSING CONSTRUCTION. MACHINERY AND EQUIPMENT ARE ALSO THE MAJOR ITEM IN POLISH EXPORTS TO THE USSR THIS YEAR, ACCORDING TO A PRESS STATEMENT MADE BY POLISH FOREIGN TRADE MINISTER JERZY OLSZEWSKI, WHO SAID THAT THE VALUE OF 1977 POLISH EXPORTS IN THIS CATEGORY WILL BE OVER ONE BILLION RUBLES (ABOUT \$1.3 BILLION).

B) RAW MATERIALS - IN 1978 POLAND WILL RECEIVE
"ALMOST 13 MILLION TONS" OF SOVIET CRUDE OIL, 6.5 MILLION
TONS OF ENRICHED IRON ORE, 2.5 BILLION CUBIC
METERS OF NATURAL GAS, ABOUT 100,000 TONS OF COTTON,
AND "CONSIDERABLE QUANTITIES" OF NON-FERROUS METALS
AND TIMBER. DURING 1978, POLAND WILL BE "THE SOVIET
UNION'S LARGEST SUPPLIER OF COAL, COKE, AND SULPHUR."
NO OTHER POLISH RAW MATERIAL EXPORTS ARE MENTIONED.

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D) INDUSTRIAL COOPERATION AND SPECIALIZATION - AS
REPORTED IN TRYBUNA LUDU, THE PROTOCOL "CALLS FOR A
FURTHER TIGHTENING OF THE PROCESS OF INTEGRATION BE-
TWEEN THE POLISH AND SOVIET ECONOMICS." THE PROPOR-

TION OF MACHINERY AND EQUIPMENT DELIVERIES BASED ON
BILATERAL INDUSTRIAL-COOPERATION AND SPECIALIZATION
AGREEMENTS (IE, BETWEEN SPECIFIC POLISH AND CSOVIET
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PLANTS OR BETWEEN SPECIFIC SECTORS OF POLISH AND
SOVIET INDUSTRY) IS TO INCREASE FROM 47 PERCENT IN
1977 TO ALMOST 53 PERCENT IN 1978. IN HIS PRESS
STATEMENT, OLSZEWSKI SAID THAT, IN ADDITION TO TRADI-
TIONAL INDUSTRIAL COOPERATION IN THE PRODUCTION OF MACHINE
TOOLS, AUTOMOBILES, AND CONSTRUCTION MACHINERY, THERE
WILL BE INTENSIVE COOPERATION DDURING 1978 IN THE
AREA OF AIRCRAFT AND ELECTRONIC-COMPUTER PRODUCTION.

3. BOTH PATOLICHEV AND OLSZEWSKI PRAISED THE NEW
AGREEMENT AS INDICATIVE OF THE UNUSUALLY RAPID GROWTH
IN POLISH-SOVIET ECONOMIC RELATIONS AND THE POTEN-
TIAL FOR EVEN FURTHER GROWTH OVER THE NEXT SEVERAL
YEARS. OLSZEWSKI NOTED THAT THE USSR NOW ACCOUNTS FOR
ABOUT 30 PERCENT OF ALL POLISH EXPORTS. HE ALSO
STRESSED THE IMPORTANCE OF SOVIET EXPORTS TO POLAND
IN CONTRIBUTING THE THE SUCCESS OF THE GOP'S "ECONOMIC
MANEUVER" WHICH AIMS TO PROVIDE MORE CONSUMER GOODS.
AND A BETTER STANDARD OF LIVING FOR THE POPULATION.
PATOLICHEV SPOKE OF A POSSIBLE SEVEN-BILLION RUBLE
TRADE TURNOVER IN 1979 AND FIGURES MUCH HIGHER THAN
THAT IN FUTURE YEARS.

4. THE TRADE PROTOCOL CEREMONIES WHICH WERE PUBLI-
CIZED BY FRONT PAGE PHOTOGRAPHS OF PATOLICHEV MEET-
IN WITH GIEREK AND JAROSZEWICZ, FOLLOWED A MEETING
IN MOSCOW TEN DAYS EARLIER OF THE POLISH-SOVIET
COMMISSION FOR ECONOMIC, SCIENTIFIC, AND TECHNOLOGICAL
COOPERATION. PRESS REPORTS ON THIS MEETING, WHICH
TOOK PLACE AT THE CEMA SECRETARIAT BUILDING, STRESSED
THE IMPORTANCE OF JOINT SPECIALIZATION AND CO-PRODUC-
TION AGREEMENTS BETWEEN POLISH AND SOVIET INDUSTRIES,
SOVIET AID TO POLAND IN CONSTRUCTION OF THE KATOWICE
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STEEL MILL AND THE 280 KILOMETER, BROAD-GAUGE RAIL-
WAY FROM THE SOVIET FRONTIER TO KATOWICE. SEVERAL NEW
AGREEMENTS WERE SIGNED. THE COVER COOPERA-
TION IN PRODUCING SULPHURIC ACID AND AUTOMATIC-TELE-
PHONE EXCHANGES AND INCLUDE "A PROTOCOL ON COOPERATION BETWEEN
THE POLISH MINISTRY OF FOREIGN TRADE AND THE SOVIET

STATE COMMITTEE FOR FOREIGN ECONOMIC RELATIONS IN BUILD-
ING CERTAIN INDUSTRIAL AND OTHER PROJECTS."

5. COMMENT. ALTHOUGH THESE NEW AGREEMENTS OBVIOUSLY
CONFIRM THE WELL-KNOWN FACT OF SOVIET PRE-EMINENCE IN
POLISH FOREIGN TRADE, THEY ALSO POSE
SOME INTRIGUING QUESTIONS. HOW MUCH OF THIS
TRADE INCREASE IS PAY-BACK FOR MOSCOW'S AID TO POLAND,
AND ESPECIALLY FOR THE ONE BILLION RUBLE CREDIT EXTENDED
IN THE FALL OF 1976? AND HOW MUCH IS NEW SOVIET AID,
POSSIBLY IN RESPONSE TO POLISH REQUESTS REPORTEDLY
PRESENTED TO BREZHNEV DURING GIEREK'S RECENT VISIT TO
MOSCOW? AND, FINALLY, TO WHAT EXTENT DO THEY INDICATE
TIGHTER POLISH INVOLVEMENT IN CEMA INTEGRATION?

6. ALTHOUGH PRECISE DATA, ARE UNAVAILABLE,
WE ESTIMATE THAT A CONSIDERABLE AMOUNT OF THE TRADE
INCREASE BOTH WAYS IS DUE TO RECENT SOVIET CREDITS
AND SOME POLISH REPAYMENTS. THE PROJECTED 27
PERCENT INCREASE IN POLISH CAPITAL-EQUIPMENT EXPORTS
TO THE USSR IN 1978 IS IMPRESSIVE. THE
LIMITED FIGURES AVAILABLE ON SOVIET -POLISH TRADE
DURING 1977 HAVE INDICATED THAT IT IS RUNNING ABOUT
TWENTY-PERCENT OVER 1976 LEVELS, MUCH OF THE INCREASE
DUE TO POLISH EFFORTS WHICH ARE PROBABLY BEING BILLED

AGAINST THE 1976 SOVIET CREDIT. FOR REPAYMENT, IT
SEEMS POSSIBLE THAT THE SOVIETS HAVE DEMANDED INCREASED
POLISH EXPORTS OF CERTAIN QUALITY TYPES OF MACHINERY AND EQUIP-
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MENT. OLSZEWSKI'S STATEMENT THAT NEARLY ONE-THIRD
OF ALL POLISH EXPORTS GO TO THE SOVIET UNION ALONE
IS ALSO AN IMPRESSIVE INDICATOR.

7. ON THE ISSUE OF CLOSER CEMA INTEGRATION, THE
PLANNED INCREASE FOR 1978 CALLING FOR THE BASING OF UP TO 53
PERCENT OF ALL TRADE IN MACHINERY AND EQUIPMENT
ON SPECIALIZATION AND COOPERATION AGREEMENTS IS
A RELATIVELY HIGH FIGURE. OLSZEWSKI'S COMMENTS REGARDING
INTENSIVE COOPERATION IN THE COMPUTER AND AVIATION
INDUSTRIES PROBABLY REFLECT GUIDELINES
SET UP BY THE SOVIET UNION'S GOSPLAN AND THE
CEMA SECRETARIAT. THE EMBASSY HAS BEEN RELIABLY
INFORMED THAT LATE IN THE SUMMER OF 1977 THE POLISH
AVIATION FIRM, PEZETEL, SUDDENTLY DROPPED ALL ONGOING
PLANS FOR COOPERATION WITH WESTERN FIRMS ON THE PRODUCTION
OF A MEDIUM-SIZED, 25 PASSENGER AIRCRAFT. THE REASON GIVEN WAS
THAT A TOP-LEVEL DECISION HAD BEEN MADE TO WORK WITH THE

SOVIETS ON PRODUCTION OF THE AN-28, WHICH
IS NOT CURRENTLY IN SERIAL PRODUCTION
IN THE USSR. PEZETEL HAS BEEN MAKING AVIATION SPARE
PARTS FOR THE USSR FOR SEVERAL YEARS, SO PRODUCTIONS OF
A COMPLETE AIRCRAFT IS MERELY A FURTHER EXTENSION OF
EXISTING COOPERRATION.

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8. WE ALSO SUSPECT BUT CANNOT YET CONFIRM THTAT SOME
OF THE UNSPECIFIED AGREEMENTS SIGNED AT THE COMMISSION
MEETING IN MOSCOW, AND ESPECIALLY THOSE FOR PROJECTS
TO BE CARRIED OUT BY THE SOVIET STATE COMMITTEE FOR
FOREIGN ECONOMIC RELATIONS, ARE DIRECTLY CONCERNED WITH
CEMA INTEGRATION.

9. WE FIND THE FIGURES FOR SOVIET RAW-MATERIAL ALLOCATIONS
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WHICH POLAND WILL RECEIVE NEXT YEAR
INTERESTING NOT BECAUSE THEY ARE UNEXPECTED,
BUT BECAUSE, ON THE CONTRARY, THEY ARE PREDICATABLE.
IN 1978, POLAND WILL APPARENTLY RECEIVE JUST SLIGHTLY MORE SOVIET
CRUDE OIL THAN IT RECEIVED IN 1977 AND ABOUT THE
SAME AMOUNTS OF COTTON, NATURAL GAS AND IRON ORE. AND
WE BELIEVE THAT, IF WE HAD ACCESS TO OFFICIAL FIGURES, THE
SAME WOULD PROVE TO BE TRUE FOR MOST OF THE ENTIRE
RANGE OF RAW-MATERIALS ALLOCATIONS FOR POLAND.
THIS IS BECAUSE, AS FAR AS THE
SOVIET UNION IS CONCERNED, EXPORTS OF FUEL AND INDUS-
TRIAL RAW MATERIALS TO EASTERN EUROPE ARE A PERSISTENT,
IRRITATING, FRUSTRATING DRAG, ONE OF THE UNPLEASANT
PRICES IT MUST PAY FOR CEMA/WARSAW PACT HEDGEMONY.
CRUDE OIL AND COTTON SHIPPED TO WESTERN EUROPE EARN
HARD CURRENCY, NOT CLEARING ACCOUNT ZLOTYS. CONSEQUENTLY, RAW-
MATERIAL AND FUEL DELIVERIES FOR POLAND AND OTHER EE
COUNTRIES ARE NON-NEGOTIABLE ITEMS, DETERMINED , WE
BELIEVE, ON THE BASIS OF ECONOMIC-POLITICAL CONSIDERA-
TIONS WHICH ARE TO THE EFFECT THAT EACH COUNTRY MUST RECEIVE JUST
ENOUGH TO KEEP ITS ECONOMY VIABLE AND ELIMINATE ANY
DANGER OF SERIOUS BREAKDOWN OR, EVEN WORSE, POPULAR
UNREST AND DISTRUBANCEES. IF CEMA EE COUNTRIES WANT
MORE, THEY MUST SCRAMBLE AND BARGAIN FOR IT FROM
WESTERN SOURCES OR PAY PREMIUM HARD CURRENCY PRICES TO THE
SOVIETS THROUGH SPECIAL CHANNELS.

10. IN VIEW OF THIS SITUATION THERE SEEMS TO US TO
BE A CERTAIN IRONY IN MOSCOW'S MAGNANIMOUS GESTURE OF
OFFERING 13,000 SOVIET FIAT (LADA) CARS TO POLAND IN
1978, BECUASE, AS OLSZEWSKI SAID IN HIS PRESS STATEMENT,
THERE IS SUCH AN ENORMOUS, UNSATISFIED DEMAND FOR
PASSENGER (PRIAVATE) CARS IN POLAND. THE GASOLINE FOR
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THESE ADDITIONAL 13,000 CARS WILL VERY PROBABLY HAVE COME FROM
SOME HARD-CURRENCY SOURCE AND THIS FACT, GIVEN POLAND'S
FINANCIAL SITUATION IN THE WINTER OF 1977/78, MAKES
SOVIET GENEROSITY A RATHER BARBED GESTURE.

11. SUMMING UP, THERE CAN BE LITTLE DOUBT THAT POLISH TRADE WITH
THE SOVIET UNION WILL EXPAND SHARPLY OVER THE NEXT THREE YEARS,
A DEVELOPMENT WHICH IS NOT OUT OF LINE WITH POLAND'S CURRENT FIVE-

YEAR PLAN. THE INITIAL IMPACT OF THIS TREND MAY ACTUALLY HAVE BEEN HELPFUL FOR POLAND IN ITS EFFORTS TO INCREASE EXPORTS TO THE WEST. THIS IS BECAUSE, THANKS TO RUBLE CREDITS AND OTHER FACTORS, THE POLES HAVE BEEN RUNNING A HEAVY TRADE DEFICIT (POSSIBLY AS MUCH AS HALF A BILLION DOLLARS THIS YEAR) IN THEIR TRADE WITH THE SOVIET UNION. BUT NOW THE TIDE MAY BE TURNING. THE SOVIETS ARE DEMANDING MUCH LARGER IMPORTS OF POLISH MACHINERY AND EQUIPMENT AND PRESSURES TO BALANCE THE DEFICIT MAY BE INCREASING, A NEW PROBLEM FOR A COUNTRY WHICH ALREADY HAS TOO MANY. DAVIES

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